



**Board of Assessors  
730 Massachusetts Avenue  
Arlington, MA 02476**

Date: 03/18/2024

Time: 5:30 pm

Location: Town Manager's Conference Room, 2<sup>st</sup> Floor, Town Hall Annex

**Minutes (DRAFT):**

The meeting was called to order at 5:30 pm, by William Zagata (WZ). Seconded by Mary Winstanley O'Connor (MWO). Gordon Jamieson (GJ) voted yes, MWO voted yes & WZ voted yes.

- In attendance: Mary Winstanley O'Connor (member Board of Assessors), Gordon Jamieson (chair Board of Assessors) William Zagata (member Board of Assessors), Dana Mann (Director of Assessments), James Feeney (Town Manager), Eric Helmuth (chair Select Board), Alex Magee (Deputy Town Manager/ Finance Director) and Steven DeCoursey (member Select Board).
- Mary Winstanley O'Connor, on behalf of the Board of Assessors, thanked Mr. Helmuth & Mr. DeCoursey for attending.
- Gordon Jamieson gave an overview of steps and timeline needed to implement the new means-tested senior exemption.
- Director Mann made a review of the mean-tested senior exemption, including the estimated range of number of applicants (400-600) based on the number of the Massachusetts circuit breaker applicants in Arlington, 744 for 2021. The estimated average tax credit is expected to increased to \$1,200 (from \$1,000) due the State's increase of max CB tax credit for calendar year 2023.
- Timeline of steps:
  - BOA to approve application form in June
  - Application available to public July, deadline early September
  - BOA review and approve applications by October 21<sup>st</sup>
  - Select Board meeting to establish percentage of state credit for exemption amount
  - Classification early November
- An explanation of funding was asked. Director Mann explained the exemption is funded by raising the residential tax rate by reducing the Residential value by the amount of the exemption, estimated 480,000 - 720,000 in tax exempt amount. An estimation using 2024 figures and estimated exemption totals, indicated an increase in the Residential tax rate of approximately .05 cents. Resulting in a split tax rate for the first time in Arlington's history.
- Mr. Feeney asked about the purpose of Warrant Article 21. Director Mann, indicated that another Massachusetts Town's Act (which allows for this exemption) the wording allows funding for the exemption via the Town's overlay. Article 21 copies that language and would provide this option to Arlington's Select Board. However, the estimated exemption amount would be larger than the current overlay can support, making this option impractical. The Board of Assessors has decided to call for no action on Warrant article 21.
- Mr. Jamieson pointed out that the Select Board could use classification to balance the tax rate by shifting the amount needed to equalize the tax rate.

- Ms. O'Connor indicated that the Director will have those calculation available at the Classification hearing early in November.
- A Motion to adjourn at 7:17 pm was made by MWO. Seconded by WZ
  - MWO voted yes.
  - GJ voted yes.
  - WZ voted yes.
- Next meeting planned for April 8, 2024

Respectfully submitted,  
Dana Mann